SUCCESS STORY

How Truliant is using OrbusInfinity to bring greater visibility to its application portfolio

63%
ESTIMATED ROI

$169K
ESTIMATED ANNUAL VALUE

4,800
HOURS OF POTENTIAL ANNUAL SAVINGS ACROSS 200 APPLICATIONS

320
HOURS SAVED A YEAR ACROSS 40 ARCHITECTURE ENGAGEMENTS

When enterprise architect (EA) Wan-Pin Van Dyke joined Truliant Federal Credit Union in 2022, one of her priorities was to improve how the organization managed its application portfolio. The information she needed was scattered across spreadsheets, making it hard to get a clear picture of which applications the credit union had, and who owned them. She also had little visibility into how those applications supported the wider business.

To bring this information together and support application portfolio management, Truliant introduced Orbus iServer. Later, as the organization expanded its use of Microsoft 365, it moved to OrbusInfinity. Now, Truliant uses OrbusInfinity across multiple areas, including enterprise architecture, project delivery, and business process mapping. This makes it easier for teams to find architecture information and see how applications fit together.

The challenges

Making sense of a scattered application portfolio

In 2022, application portfolio rationalization was a key strategic priority for Truliant. However, the application inventory was spread across spreadsheets on a shared drive, with different IT leaders maintaining the records. Information such as business ownership and capabilities was inconsistent, and the spreadsheet made it difficult to see relationships between applications or analyze the portfolio. “You couldn’t get any analytics other than someone filtering the spreadsheet. It was also really hard to maintain, as it was maintained between the different IT leaders,” said Van Dyke.

INDUSTRY
Financial services (credit union)

REGION
North America

USE CASE:
Application rationalization

Application portfolio management

Application dependency & impact analysis

Business process mapping

Project delivery and architecture governance

PLATFORM
OrbusInfinity

Without a proper enterprise architecture model it was difficult to get analytics, which meant reporting was extremely limited. Understanding the impact of technology changes often required extensive searching through multiple documents, which was frustrating and time consuming.

Managing application complexity following a merger

The merger with Piedmont Advantage Credit Union, completed on September 1, 2026, added to the challenge. The merger brought Truliant's membership to more than 350,000, with over 38 locations and more than $5 billion in assets. The initial plan was to move Piedmont Advantage onto Truliant's systems rather than retain its existing technology, but assessing which applications to retain, replace or retire required more information than the spreadsheet provided.

Van Dyke's job was to work through the available information to compare the two organizations' applications and identify where they overlapped or differed. She also had to consider additional factors such as contract termination costs and team preferences, to help plan the integration. With scattered information, it was difficult to build a complete picture of the two technology environments and make informed decisions.

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>
> **Wan-Pin Van Dyke, Enterprise Architect, Truliant Federal Credit Union**



The solution

Bringing application information into one place

Truliant's initial decision to use Orbus iServer reflected the team's needs at the time, with the immediate priority being to bring its application inventory into the platform. Orbus's licensing model allowed the team to start with application portfolio management and add capabilities as its needs changed. When Truliant was ready to make greater use of Microsoft 365, it moved to OrbusInfinity.

> "Start small and build gradually... making little success and building upon it."
>
> **Wan-Pin Van Dyke**

The company has since expanded its application inventory to include ownership, costs, vendors, capabilities and lifecycle status. It has also mapped how applications relate to and depend on each other. This gives Truliant a clearer view of its technology and helps the team make better decisions about its applications.

Now, Truliant uses OrbusInfinity to map applications and show how they connect. It can also assess the potential impact of changes. Dashboards, including a "CIO cockpit", are designed to give IT leaders different views of the application portfolio. The company has also expanded its SharePoint

document libraries to give project teams easier access to relevant materials from enterprise architecture, business analysis and process analysis.

Making architecture information accessible across teams

OrbusInfinity supports work across Truliant's corporate projects and smaller, day-to-day initiatives. Solution architects, the PMO, business analysts, process improvement specialists, developers, security teams, and business subject matter experts can all access current-state and target-state architectures, as well as integration catalogs, and requirements. To support this, the EA team creates project workspaces where teams can access relevant information, including reference architectures and documentation.

In addition, Truliant is using OrbusInfinity for business process mapping in collaboration with its Digital Transformation Team. This allows analysts to draw on existing application and capability information rather than starting from scratch.

Truliant's past and present CIOs have also used the platform. The new CIO, who joined in March 2026, requested access immediately, and uses the dashboards to explore applications and identify gaps in the documentation.

The results

One of the clearest benefits has been having application information in one place. Teams can now more easily access details about applications, ownership, lifecycle status, costs, capabilities, vendors and ecosystems. This makes it much easier for teams to find information themselves, rather than having to rely on the EA team to find information for them.

Truliant is continuing to find more ways to reuse the architecture information it has already created. For example, teams can now draw on existing application and capability data when they are mapping business processes, which saves time and avoids duplicating work.

Business transformation is perhaps where Truliant has seen one of the biggest impacts. Teams now have access to vital architecture information, which they can use to plan projects and understand how any proposed changes might affect existing systems. The platform also supports the EA team's wider work to improve governance and connect technology decisions with business priorities.

To help understand the value of OrbusInfinity, Truliant has been estimating potential time savings from application portfolio management:

- Van Dyke's initial calculation assumed two hours saved per application each month across 200 applications, which results in 4,800 hours

> "Teams can now find application information themselves, including ownership, costs, lifecycle and dependencies, instead of relying on the EA team to find it for them."
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annually. Assuming that 10% of these hours are realized, along with an average resource cost of $75 per hour, this would represent $36,000 in potential annual value.

- Truliant has also been estimating potential time savings across other areas of enterprise architecture. Based on 40 architectural engagements a year and an estimated eight hours saved per engagement, Van Dyke calculated a potential saving of 320 hours, equivalent to $32,000 in annual value at an assumed rate of $100 per hour.
- Overall, Truliant's draft business case estimates $169,000 in annual value against a $104,000 subscription cost. This gives a potential net benefit of $65,000 and an estimated ROI of 63%.

As it stands, these figures are based on preliminary assumptions.

What's next?

Going forward, Truliant is now looking to build on its work in application portfolio management. The EA team is currently planning to work with the infrastructure and operations team to develop a technology component portfolio, starting with a few selected pilot areas.

The company is also exploring business architecture as part of its wider EA development, while continuing to improve application rationalization and build a clearer picture of technology lifecycles.

Drawing on her experience at Truliant, Van Dyke advises other organizations to start small and build gradually. She frames this as "making little success and building upon it."

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